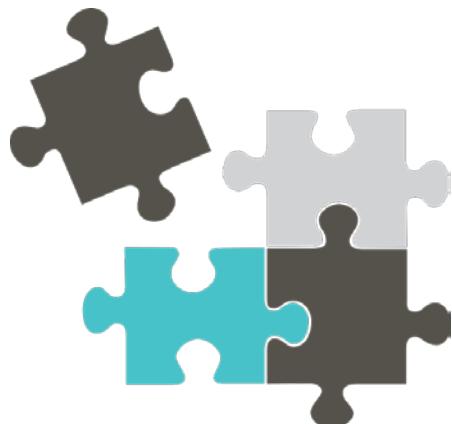


# eGrants User Guide

## Principal Applicants



# Contents

Background.....	3
Registering a Full Account.....	4
Your Details.....	5
Applications.....	6
Display Submitted Application Forms .....	6
Sample Application Forms.....	7
Create a New Application Form.....	7
Application Details.....	8
Application Options .....	9
Support Material.....	12
Edit Applications.....	12
View Applications .....	14
Email/Print this Application .....	14
Password .....	16
Uploading documents.....	16
Saving a form.....	16
Delegates.....	17
For Heads of Departments Only .....	17
Notes.....	19
Key.....	19
Nominating Secondary Applicants.....	20
Secondary Applicant Responses.....	21
Submitting Applications .....	23
Approval of Application Forms.....	24
Head of Department/or equivalent Approval .....	24
Organisation Administration Department Approval.....	25
Submission to the Wellcome Trust .....	25

# Background

- The eGrants system enables applicants to apply for grants online. The system provides a workflow to guide applicants through the necessary steps towards final submission to the Wellcome Trust.
- Principal Applicants are responsible for creating, editing and nominating Secondary Applicants for all application forms.
- This document is intended as a ‘How To’ reference for the main functionality that Principal Applicants are likely to use.
- You may find it helpful to read this document in conjunction with the [eGrants User Guide](#) and the [eGrants Frequently Asked Questions](#).
- If you are involved in an application in a different role, please refer to the relevant user guide in the eGrants [Help](#) section.

## Sir Henry Dale Fellowship Applications

Principal Applicants for the Sir Henry Dale Fellowships should use this document for guidance through the eGrants application process. Although the branding of the eGrants [website](#) for the Sir Henry Dale Fellowships is slightly different, the functionality is as described in this user guide.

Guidance notes for completing full applications for the Sir Henry Dale Fellowships can be found on the scheme [webpage](#).

For some preliminary applications and some joint applications, it may not be possible to use eGrants. Please refer to the relevant scheme pages on the Wellcome Trust [website](#) for guidance on how to apply.

An additional information document is available for the following schemes which can be found in the [eGrants Help](#) section:

- Investigator Awards in Biomedical Science
- Senior Research Fellowships in Biomedical Science
- Principle Research Fellowship in Biomedical Science
- Investigator Awards in Medical History and Humanities

## Engaging Science Applications

Principal Applicants for [Engaging Science](#) Applications should use this document for guidance through the eGrants application process.

Additional guidance notes can also be found [here](#).

Further information can be found in the ‘Information’ box on the left-hand side of the screen. This is displayed throughout all pages of eGrants which acts as a key point of reference to provide support during the application process:

- Help
- eGrants FAQ
- Registered Administering Organisations
- Sample Application Forms
- Email and Download Queue\*
- Grant Conditions
- Policies and Positions
- Feedback

Information
Help
eGrants FAQ
Registered Administering Organisations
Sample Application Forms
Email & Download Queue
Grant Conditions
Policies and Positions
Feedback

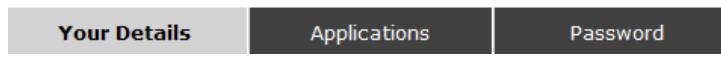
\*Please note, the email/download queue and the feedback options are only available once you have registered with eGrants.

## Registering a Full Account

Individuals expected to be involved in an application as a Principal Applicant are required to register a **Full Account**. Please refer to the [eGrants User Guide](#) on how to complete this step.

Once you have registered a full account and logged into eGrants, the following options will be available at the top right-hand of the screen:

- [Your Details](#)
- [Applications](#)
- [Password](#)



An additional ‘Delegates’ tab (page) will be present if you have Head of Department status. Further information about delegates can be found in [here](#).

Below these options, you will see the following box:

Login name John Smith	Registered 05/11/2012	Head of Department <span style="color: cyan;">(i)</span> NO	Unique Reference No. 1234	Account Type <span style="color: cyan;">(i)</span> Full
<b>System Messages :</b> *FOR INFORMATION*				

- Login name
- Registered date
- Head of Department status
- Unique Reference No.
- Account Type
- System Messages (for eGrants announcements)

## Your Details

The information displayed on the ‘**Your Details**’ tab is the information you provided at the point of registration and is automatically copied over to application forms.

It is therefore important that your details are checked and, if necessary, updated before creating and/or submitting a new application.

To update your details:

1. Click the ‘**Your Details**’ tab
2. Click ‘**Edit Details**’
3. Amend your details
4. Click ‘**Save**’



You may also verify/register an ORCID id via this page. Refer to the [eGrants User Guide](#) for further information.

Once an application has been submitted to the Wellcome Trust, the relevant Trust staff should be informed of any subsequent changes of your details that may be pertinent to the submitted application (e.g., contact details).

**Please note:** the CV Details section does not need to be completed by applicants applying for Engaging Science awards (i.e. Small Arts or People Awards). For further information please contact [pegrants@wellcome.ac.uk](mailto:pegrants@wellcome.ac.uk).

# Applications

The ‘**Applications**’ page displays all applications you are involved with, either as a Principal Applicant, Secondary Applicant, and Delegate, or as a Head of Department/or equivalent.

To create an application form, follow the instructions in section ‘[Create a New Application Form](#)’.

Once an application form has been created, the most recent application will be listed at the top with the following categories:

<b>App. Form. Ref</b>	The Application Form Reference number
<b>Applicant</b>	The Principal Applicant’s full name
<b>Title</b>	The title of the application
<b>Status</b>	The status of the application (i.e. in progress)
<b>Your role</b>	Your role in the application (i.e. Principal Applicant)
<b>Type &amp; Organisation</b>	The type of the application (i.e. Investigator Award) & the administering organisation
<b>Edit/View</b>	Allows you to view/edit the application
<b>Remove**</b>	Allows you to remove your application form from eGrants

\*\*If the remove option is selected, you will be prompted to confirm your choice, as this option will permanently delete your application from eGrants.

## Display Submitted Application Forms

When this box is unchecked, forms submitted to the Wellcome Trust, including those on which you are a secondary applicant, are not displayed. To view submitted application forms, simply check the box (as shown below):

Display submitted forms below

# Sample Application Forms

Sample Application Forms are model forms and are **for information only** and should not be completed or submitted to the Wellcome Trust.

To view/download '**Sample Applications Forms**' (PDF):

1. Press the '**Sample Application Forms**' button on the '**Applications**' tab.
2. Select the appropriate Funding Area from the drop-down list, then select the relevant form available.

You can also view Sample Application Forms at any point by clicking the '**Sample Application Forms**' link in the '**Information**' box.

## Create a New Application Form

To create a new application form, click the '**Create a New Application Form**' button in the '**Applications**' page to display the following:

**New Application Form:**

Please select an application form from the relevant **Funding Area** and select the relevant **Scheme Type** and **Scheme Name** from the drop down lists below. Please make sure to enter the **Application Title** in the space provided and register the **Administering Organisation** for your form.

Funding Area :  (i)

Scheme Type :  (i)

Scheme Name :  (i)

Please additionally enter the following for this application ...

Application Title : (i)

Max. title length: 233 characters

Administering Organisation :

(i)

To create a new application form:

1. Select the relevant '**Funding Area**' from the first drop-down list.
2. Select the relevant '**Scheme Type**' from the second drop-down list.
3. Select the relevant '**Scheme Name**' from the third drop-down list.

- This will display the available application forms. If you are unsure which form to select, please refer to the scheme webpage by clicking '**More info**' next to the application form or where this isn't available, visit our [website](#).
- Once you have selected the relevant form, please enter the **Application Title** in the space provided and the **Administering Organisation** for your application.
- If you are not affiliated with an organisation, please choose '**No Organisation**'. This option only applies to individuals making an application to the Engaging Science schemes and some of our Public Health and Tropical Medicine schemes. If you have any queries about the '**No Organisation**' option, please contact [eGrants Support](#).
- Once you have completed all the relevant fields, click the '**Create Application**' button which will create an '**Application Details**' page for your application form.

**Please note:** only individuals with a **Full Account** are able to create new application forms. If you have a Partial Account and wish to upgrade your account, refer to the [eGrants User Guide](#) on how to complete this step.

## Application Details

Each application form created on eGrants has an '**Application Details**' page, which displays the following information:

Application Options		<a href="#">Edit this Application</a> <a href="#">View this Application</a> <a href="#">Email/Print this Application</a>
App. Form Ref.	12345	
Type	Sir Henry Wellcome Postdoctoral Fellowship	
Title	Research Project <a href="#">[Update]</a>	
Applicant	Professor John Smith	
Your Role	Principal Applicant	
Delegates	None <a href="#">[Update]</a>	
Form Version	5	
Created	22/01/2013 12:43:46	
Last Updated	22/01/2013 12:43:46	
Note(s)	None	
Application History	<a href="#">View Application History</a>	
Status	In Progress	
Release Status	Pending Decision	
Cover Letter	None <a href="#">[Update]</a>	
Head of Department	Unassigned <a href="#">[Update]</a>	
Administering Organisation	Name of organisation <a href="#">[Update]</a>	

# Application Options

Options available for the application:

- Edit this application
- View this application
- Email/print this application

These options will vary depending on the stage at which you are in the application process. See '[Completing the Application](#)' for further details.

## App. Form. Ref

The eGrants Application Form Reference number for the application (auto-generated when an application form is created).

## Type

The type of application being completed (i.e. Investigator Award in Biomedical Science).

## Title

The title of the application form, which can be changed at any stage, prior to submission.

To change the application title:

- Click the [\[Update\]](#)link next to the title
- Enter new title in the space provided
- Click 'Save'

## Applicant

The Principal Applicant's title, full name, and current organisation.

## Your Role

This displays your role (involvement) with the application.

## Delegates

Displays delegates you have given access to your application form. To add a Delegate to this form:

- Click the [\[Update\]](#)link next to 'Delegates'
- Click 'Find User' or enter the eGrants 'Unique Reference Number' (if known)
- Click 'Add Delegate'

This will only give delegate access to this form, it will not give access to any other form or your account. Refer to the '[Delegates](#)' section for further information.

## **Form Version**

This shows the version number of your application form.

### **Please note:**

The Trust updates eGrants application forms on a regular basis; please make sure you are using the most up-to-date form. If in doubt, contact [eGrants Support](#) (please quote the Application Form Reference number and the date the form was created).

### **Created**

The date when the application form was created.

### **Last Updated**

The date when the application form was last updated.

### **Note(s)**

This displays Notes that have been created (see the [Notes](#) section on how to update this).

### **Application History**

To show the application form history, click '[View Application History](#)'.

### **Status (Form Status)**

This refers to the status of the application form, i.e. '**In progress**', '**Submitted**'. Please see the [eGrants User Guide](#) for further information about application statuses.

### **Release Status**

This refers to the status of any Secondary Applicant responses, i.e. whether they have rejected/accepted their role in the application. For further information, please contact [eGrants Support](#).

### **Cover Letter**

To add a cover letter (**optional**):

- Click [\[Update\]](#) next to the '**Cover Letter**' heading
- Click '**Upload New/Remove Existing Covering Letter**' to upload a document, OR
- Type the text in the space provided
- Click '**Submit Text**'

### **Please note:**

- Entering new cover letter text in the textbox will automatically overwrite any previously entered text/uploaded file.
- It is advisable to write your cover letter offline and enter the text/upload file once you are satisfied.

## **Head of Department**

This displays the Head of Department/or equivalent responsible for approving the application form. To assign a Head of Department/or equivalent:

- Click [\[Update\]](#) next to ‘unassigned’
- Select the relevant name from list
- Press ‘Select’

If the name you require is not on the list, contact the Organisation Administration Department who is listed on your form (administering organisation). If you do not require a Head of Department, this option will be displayed as ‘**Bypassed**’.

Please refer to ‘[Submitting Application Forms](#)’ for further details of the Head of Department approval process.

## **Administering Organisation**

This displays the organisation that will administer the award. To change the Administering Organisation:

- Click [\[Update\]](#) next to the organisation name
- Re-select the organisation from the drop-down list
- Click ‘Save’

If you are not affiliated with an organisation, select ‘**No Organisation**’ and click ‘Save’. If your organisation is not on the list, please contact [eGrants Support](#) to have it registered.

## **Submit Button**

Once all relevant parts of the application form have been completed, the ‘**Submit**’ button will appear at the top of the ‘Application Details’ page, for example:

The screenshot shows the 'wellcome trust' eGrants application interface. The 'Applications' tab is selected. In the center, a box highlights a message: 'Your application form is complete and ready for submission.' Below this, a button says 'Submit directly to The Wellcome Trust'. A large red arrow points to this button. At the bottom of the page, there are links for 'Edit this Application', 'View this Application', and 'Email/Print this Application'. The application details table includes fields like App. Form Ref., Type, Title, Applicant, Your Role, Delegates, Form Version, Created, Last Updated, Note(s), Application History, Status, Release Status, Cover Letter, Head of Department, Administering Organisation, and Name of Organisation, each with an '[Update]' link.

# Support Material

Please use the following support materials for reference when completing eGrants application forms:

- [Help section and User Guides](#)
- [Frequently Asked Questions](#)
- The guideline icons ⓘ displayed throughout the entirety of eGrants
- Wellcome Trust [website](#)
- [eGrants Support](#)

If you are completing applications for Engaging Science or Innovations (formerly Technology Transfer), please refer to the relevant funding sections on the external [website](#) for further advice and support.

## Edit Applications

Application forms on eGrants can only be edited while the form Status is '**In Progress**'. To check the status of your application form, please refer to the '**Application Details**' page of your application form.

The option to '**Edit this Application**' allows you to edit and complete the application.

To edit the application:

1. Click [Edit this Application](#) on the '**Application Details**' page.
2. This will open the application and display the following information

PROJECT:	Notes	Save
<a href="#"><u>&lt;&lt; App. Details   Next &gt;</u></a>		
<b>Information for applicants</b>		
Information for applicants [ref: A8108.16199] Question-specific guidelines to help you to answer the questions on the form can be found by clicking on the information buttons ⓘ throughout the form. Additional guidelines to assist you with completing your form can be found by clicking on the information button to the right. Please confirm that you have read this information for applicants. *		
<a href="#"><u>&lt;&lt; App. Details   Next &gt;</u></a>		

3. Please read the '**Information for Applicants**' and '**Tick to confirm**' that you have read and understood the guideline information.

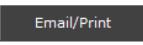
**Please note:**

If you have been given a **6-digit** ME reference number by the Wellcome Trust (e.g., 062345) you must enter this in the '**Previous Correspondence**' page at the beginning of your application form.

This is particularly important for resubmitted/multi-part applications as the ME reference number entered will prevent any delays when processing the application.

4. Fields should now be editable and ready for completion.
5. To return to the '**Application Details**' page for your form, click [<< App. Details](#)

**Key points to note when editing the application form:**

- Parts of the form are completed automatically using details entered in the '**Your Details**' section, e.g., personal details. (To amend this, please see the '**Your Details**' section of this [document](#)).
- To page through the application form either click the heading links in the left hand menu of the form, or click the [< Previous | Next >](#) inks.
- Certain questions are greyed out and will become available for editing, depending on answers to related questions.
- Total values in tables are calculated automatically.
- The form contains validation to prevent the entry of incorrect data, e.g., dates / percentage values.
- Word counters are displayed for all answers requiring text (excluding characters).
- Mandatory questions are indicated by a red asterisk \*.
- To Email/Print from within the form itself (in either Edit or View), click the 'Email/Print' tab  on the top right-hand corner.

Depending on the form you are completing, you may be required to nominate Secondary Applicants to your application. To complete this step, please see '[Nominating Secondary Applicants](#)'.

For those completing applications for Engaging Science or Medical History and Humanities, Ethics and Society, or Innovations (formerly Technology Transfer), please refer to the relevant scheme [webpage](#) for definitions of Secondary Applicants.

# View Applications

The option to '**View this Application**' allows for **View Only** access to the application form.

To view the application form:

1. Click [View this Application](#) on the '**Application Details**' page
2. This will open the application for viewing. To return to the '**Application Details**' page for your form, click [\*<< App. Details\*](#)

# Email/Print this Application

The option to '**Email/Print this Application**' allows you to generate a PDF for emailing and/or printing your application:

1. Click [Email/Print this Application](#) on the '**Application Details**' page to display the following page:

The screenshot shows the 'Email/Print Application' interface. At the top, there's a teal header bar with the 'eGrants' logo. Below it is a dark grey navigation bar. The main content area has a white background.

**IMPORTANT INFORMATION:**

- Emailing and/or printing the application form (PDF) may take longer during busier periods.
- The 'Additional Information' of the application form will not be included in the PDF generated below. It will be included in the application submission to the Trust.

To email/print your application form, you need to generate a PDF.

1. Select the relevant form parts (where applicable) from the drop-down menu.
2. Enter email address (optional).
3. Click 'Generate PDF'.

Below this, there's a form field with the following labels and inputs:

- App. Form Ref. :
- Include these part(s) : A dropdown menu set to "The entire form".
- Email address (optional) : An input field.
- Generate PDF : A button.

At the bottom of the page, there are two sections:

**Current PDFs being generated**: Currently no PDFs are being generated. There is an  Auto-refresh checkbox.

**Recent PDFs**: Currently no PDFs are being displayed.

At the very bottom, there's a footer bar with links: Security Information, System Requirements, Download Free Adobe Reader, and Cookies. It also includes a help contact link: For further help, please contact [eGrants.Support@wellcome.ac.uk](mailto:eGrants.Support@wellcome.ac.uk) or 0207 611 8700.

**Please note:** only applicants completing multi-part forms are able to see the drop-down menu.

2. Select the relevant form parts (where applicable) from the drop-down menu.
3. Enter **one** email address in the space provided (optional)
4. Click the '**Generate PDF**' button. Your application will automatically be entered into a queue under '**Current PDFs being generated**' as shown below:

#### **Email/Print Application**

---

[Refresh](#)

##### **Current PDFs being generated**

Auto-refresh

PDFs being generated are displayed below.

Position	Time Submitted	Details/Status	ETA	Options
1	11:12	App. Form Ref.:1234 Title: 5th November - IA App. Type: Sir Henry Wellcome Postdoctoral Fellowship Email To: [Download Only]	3 min(s)	<a href="#">Cancel</a>

---

##### **Recent PDFs**

Currently no PDFs are being displayed.

---

5. Once the PDF of your application form has been generated, your request will now be displayed in the '**Recent PDFs**' with the following options available:

#### **Email/Print Application**

---

[Refresh](#)

##### **Current PDFs being generated**

Auto-refresh

Currently no PDFs are being generated.

---

##### **Recent PDFs**

You will need to generate a new PDF to email/print the most-up-to-date version of your application.

Date/Time	Application Title	Options
19/12/2012 11:13	Research Project	<a href="#">View/Print</a> <a href="#">Generate new PDF</a> <a href="#">Delete</a>

#### **Please note:**

- Emailing and/or printing the application form (PDF) may take longer during busier periods (e.g., deadline day).
- The 'Additional Information' of the application form will not be included in the PDF generated. It will be included in the application submission to the Trust.

## Options

<b>View/Print</b>	Click 'View/Print' to open and print the application form (PDF).
<b>Generate PDF</b>	Click 'Generate new PDF' if you wish to email/print the most up-to-date version of the application form.  You will need to select this option if you have made any changes to the form after the 'Date/Time' shown.
<b>Delete</b>	Click 'Delete' to delete the application form from the 'Recent PDFs' list.

To View/Print PDFs, you will require Adobe Reader to view/print PDFs. If you do not already have this installed on your computer, click the '[Download Free Adobe Reader](#)' or contact your organisation's IT department.

## Password

Your password can be changed at any time through the '**Change Password**' page. Passwords must be between 5 and 20 characters long.

## Uploading documents

Some sections of the application form allow you to upload documents containing text/figures/images. Attached documents can be removed at any time prior to the submission of the application.

- Please adhere to word limits, where specified.
- Uploaded documents must NOT be password protected.
- Uploaded documents must be in portrait format.
- Please use Arial font size 11 in all uploaded documents.

## Saving a form

Applications can be saved at any point in the application process by clicking '**Save**' on the top right of the screen. You may find it helpful to save your form regularly, especially where you have entered large amounts of text and/or close to completion.

## Delegates

You may give access to other eGrants users at any organisation, who you wish to edit/complete the application form

To ‘**add**’ a delegate to your application form:

- Click the [\[Update\]](#)link next to ‘**Delegates**’
- Click ‘**Find User**’ or enter the eGrants ‘**Unique Reference Number**’ (if known)
- Click ‘**Add Delegate**’

To ‘**Remove**’ a Delegate:

1. Click [\[Update\]](#)next to the Delegate heading.
2. Select the Delegate name, and then click the ‘**Remove**’ button.

## For Heads of Departments Only

If you have Head of Department status, you have additional delegate options:

- Log on to your account
- Edit/complete all application forms
- Receive Emails

To ‘**add**’ a delegate:

1. Click the ‘**Delegate**’ tab on the top-right hand side of the page to see the following:

Name	Department	Logon	Receives Emails
No Delegates have been assigned			

**To add a new Delegate**

Search for User  or enter Reference Number here ->

2. Click '**Find User**', select the relevant organisation from the drop-down list, or enter the Delegate's eGrants Unique Reference Number in the space provided (they must provide you with the number).
3. In the next pop-up, click the '**Select User**' button to confirm your choice, and return to click '**Add Delegate**'.
4. Once selected, the Delegate's name is displayed in the '**User Delegations**' list, alongside permission options:

User Delegations: <a href="#">?</a>			
Name	Department	Logon <a href="#">?</a>	Receives Emails <a href="#">?</a>
John Smith	Science Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Remove</a> <a href="#">Update</a>			
<b>To add a new Delegate</b>			
Search for User <a href="#">Find User</a> or enter Reference Number here -> <input type="text"/> <a href="#">Add Delegate</a>			

- **Logon:** if ticked, the delegate user is able to log on as you.
- **Receive Emails:** if ticked, the delegate user receives the same eGrants emails as you, i.e. notifications of applications to approve.

**Please note:** you may select more than one Delegate user, and vary their functionality as outlined above.

To '**Remove**' a Delegate:

3. Click [\[Update\]](#) next to the Delegate heading.
4. Select the Delegate name, and then click the '**Remove**' button.

For further information on the responsibilities of Heads of Departments (or equivalent) can be found [here](#).

## Notes

Notes can be added to applications without being included in the contents of the application itself. All individuals involved in the application can use notes to communicate with each other. To add a note:

- Once inside the form, click '**Notes**' in the top right corner.
- Type your note in the pop-up.
- Click '**Add Note**'.
- The name of the person, date and time of the note are added automatically below the note text.

Notes can also be accessed from the '**Applications**' section in your account. To open notes from here, click on '**View this Application**' and click on '**Notes**' in the top right corner (NB: notes cannot be deleted).

## Key

The following guidance is displayed at the bottom left of each application form page to indicate the following:

Key	
	Completed Page
	Incomplete Page
	Required Field
	Locked

- The **green tick** denotes all mandatory fields have been completed.
- The **red line** denotes questions are incomplete or there are some unread pages.
- The **padlock** denotes the section of the form is locked for editing (this only applies to multipart forms).

# Nominating Secondary Applicants

Secondary Applicants are Collaborators, Coapplicants, Sponsors, Supervisors, Research Sponsors and Mentors that can be invited by the Principal Applicant to take part in the completion of the application form. Secondary applicants must be registered with eGrants.

Please refer to the Wellcome Trust [glossary](#) and the relevant [funding](#) scheme webpage for definitions and responsibilities of Secondary Applicants.

To nominate a Secondary Applicant:

1. Click '**Edit this Application**' to open the application
2. Click on the appropriate Secondary Applicant link on the left side of the form, e.g., Sponsors
3. Select '**Yes**' to the question '**Does this form require any...**' (i.e. Sponsor), where the following information will be displayed:

**To add a new Sponsor**

Search for User

or Enter Reference Number here ->

4. Click '**Find User**', which will open the following options:

Step 1

Select Organisation:

Enter Surname:

Step 2

Select user:

5. Select the relevant organisation from the drop-down list (step 1), or enter the surname in the space provided (step 2) and click '**Update List**'.
6. Press '**Select User**'; this will return you to the previous pop-up, then select '**Add Sponsor**' to confirm your choice.
7. An automated email will be sent to the user to notify them on how to confirm your nomination.

# Secondary Applicant Responses

## If a Secondary Applicant agrees to the nomination

1. You will be notified via an automated email from eGrants.
2. The Secondary Applicant's details are automatically included in the form.
3. The status of '**Accepted**' appears against their name.
4. Clicking on their name (underlined) accesses their details.

Please ensure the Secondary Applicant has completed all mandatory questions before proceeding with the application.

Collaborators have restricted access and can only view:

- Principal Applicant's contact details
- Project title
- Research/project summaries details
- Collaborators information

## If a Secondary Applicant refuses the nomination

1. You will be notified via an automated email from eGrants.
2. The status of '**Rejected**' appears against their name.
3. The Secondary Applicant's details cannot be accessed.

## If a Secondary Applicant does not respond to nominations

1. The status '**Pending**' will remain against their name.
2. Their details cannot be accessed or included in the application.

If a Secondary Applicant is unable to access the online application form, their details can be entered manually by the Principal Applicant. This option should only be used when the Secondary Applicant has no means of accessing the Internet.

## To enter Secondary Applicant details manually

1. Click on the appropriate Secondary Applicant link on the left side of the form, i.e. Sponsors.
2. Click '**added manually**' at the bottom of the page where the following message will appear:

### **WARNING!**

Please only use this option if it is impossible for the secondary applicant (Coapplicant/Sponsor/Supervisor/Research Sponsor/Mentor/Collaborator) to fill in a homepage. If you do so, please note that it is the Principal Applicant's responsibility to ensure that all secondary applicants are aware they have been named in the application.  
Additionally, the Coapplicant/Sponsor/Supervisor/Research Sponsor must be made aware of the Wellcome Trust's data protection statement and undertakings that will appear once you have completed the form, as individuals involved in the application process are asked to agree to these.  
Mentors must be made aware of the Wellcome Trust's data protection statement and be able to confirm that the information provided in the application on their behalf is accurate and complete.  
Collaborators are not required to sign up to the data protection statement and undertakings, but must be in a position to confirm their willingness to collaborate in the research project.

Go Back

Continue

3. Press '**Continue**' and complete all relevant fields.
4. Clicks '**Next**' to save the information entered, and continue completing your application.

If Collaborators are unable to respond to your nomination due to limited access to the internet, a Collaborator [Word] form may be completed. Please contact [eGrants Support](#) for further information or refer to the [eGrants FAQs](#) to download the form.

### **Please note:**

For those completing applications for Engaging Science, you should not use the Collaborator [Word] form. Further information can be found on the scheme webpage or by contacting Engaging Science on 0207 611 8806 / [pe@wellcome.ac.uk](mailto:pe@wellcome.ac.uk).

## To remove a Secondary Applicant:

1. Click [Remove](#) next to the Secondary Applicants name.
2. Click '**OK**' on the warning to confirm your choice.

Further information on Secondary Applicants' responsibilities can be found in the relevant User Guides in the [eGrants Help](#) section.

# Submitting Applications

Once all mandatory questions in the application form have been completed, and all individuals involved in the application have accepted their role, the application form can be submitted for approval, where required.

On the final page of the form, click [Next Step](#) where one of the following messages will appear:

Completing the form	Submitting completed forms
This message will state the form (or form part) is not yet complete, and will provide guidelines on how to complete the application form.	This message will state the form (or form part) is complete and ready for submission.

These messages provide guidance on finalising the application and the **next steps** required to submit the form for approval.

These messages can be viewed at any time while the form is '**In Progress**' by clicking on the '**Completing the form**' link at the bottom left of the form.

To submit the application for approval:

1. Click [\*\*<< App. Details\*\*](#) to return to the '**Application Details**' page
2. Click the '**Submit**' button (i.e. Submit to **Directly to The Wellcome Trust**)

The screenshot shows the 'wellcome trust eGrants' application details page. The main content area displays a message: 'Your application form is complete and ready for submission.' Below this message is a button labeled 'Submit directly to The Wellcome Trust'. A red arrow points from the text 'Submit the application for approval:' in the previous section to this button. At the bottom of the page, there are links for 'Edit this Application', 'View this Application', and 'Email/Print this Application'.

Information	
Help	<a href="#">Return to list of Applications</a>
eGrants FAQ	
Registered Administering Organisations	
Sample Application Forms	
Email & Download Queue	
Grant Conditions	
Policies and Positions	
Feedback	

**Application Details:**

Your application form is complete and ready for submission.

[Submit directly to The Wellcome Trust](#)

You will receive an automated email notification from eGrants at each stage of the submission process.

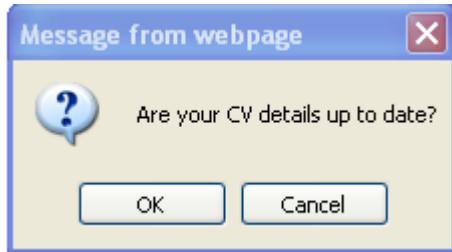
**Application Options**

App. Form Ref. 29802  
Type Small Arts Award  
Title Draft title [\[Update\]](#)  
Mr Jo Bloggs  
Principal Applicant  
None [\[Update\]](#)

Form Version 4  
Created 10/12/2013 15:01:08  
Last Updated 11/12/2013 09:39:43  
Note(s) None  
[View Application History](#)

Status In Progress  
Release Status Pending Decision  
Cover Letter None [\[Update\]](#)  
Head of Department Bypassed  
Administering Organisation Name of Organisation [\[Update\]](#)

3. You will then be prompted to confirm the following:



4. Please check the information in the '**Your Details**' page is up to date, then press '**OK**' to submit your application.
5. An automated email will be sent from eGrants to confirm the submission of your application.

## Approval of Application Forms

In general, application forms require a certain level of approval from one, or both of the following:

- Head of Department / or equivalent
- Organisation Administration Department

The level of approval required for application forms is predefined by the Organisation Administration Department and will have one of the following approval stages:

<b>1 Stage Approval</b>	Requires approval from the Organisation Administration Department only. This bypasses approval from the Head of Department or equivalent.
<b>2 Stage Approval</b>	Requires approval from the Head of Department / or equivalent and the Organisation Administration Department.

If you have selected '**No Organisation**' when creating your application, please refer to Submission to the Wellcome Trust below.

## Head of Department/or equivalent Approval

Once the application form has been completed, the nominated Head of Department/or equivalent will either '**Approve**' or '**Reject**' the application. It will either be submitted to the Organisation Administration Department for approval, or it will be returned to the Principal Applicant for amendment.

# **Organisation Administration Department Approval**

Once the application form has been submitted to the Organisation Administration Department, administrators can make changes to the application. Once complete, they can either submit the form directly to the Wellcome Trust or return it to the Principal Applicant for amendment.

## **Submission to the Wellcome Trust**

Applications submitted to the Wellcome Trust are automatically routed to the Trust's workflow system for processing. Once received, the Wellcome Trust will send an acknowledgement email to confirm receipt of your application form within 5-10 working days.

Please refer to the submission process outlined in the [additional guidance document](#) if you are completing applications for the following schemes:

- Investigator Awards in Biomedical Science
- Senior Research Fellowships in Biomedical Science
- Principle Research Fellowship in Biomedical Science
- Investigator Awards in Medical History and Humanities

## **eGrants Support**

Wellcome Trust  
Gibbs Building  
215 Euston Road  
London NW1 2BE, UK  
T: +44 (0)20 7611 8383  
E: [eGrants.Support@wellcome.ac.uk](mailto:eGrants.Support@wellcome.ac.uk)